

Cloud Consulting Firm's Sales Outlook Drifts Higher with Callbox



THE CLIENT



INDUSTRY

IT



LOCATION

York, PA



HEADQUARTERS

York, PA



CAMPAIGN TYPE

Appointment
Setting



TARGET LOCATION

All over the
United States

ABOUT

The Client provides industry-specific implementation, training, and consulting services for Microsoft Dynamics AX and Microsoft Dynamics CRM. Its target accounts include medium- to large-sized business in North America and the Caribbean. The Client is a Microsoft Cloud Solution Provider and a Microsoft Gold-Certified Partner.

TARGET INDUSTRIES

Manufacturing, Distribution, Professional Services, Microsoft Dynamics Users

TARGET CONTACTS

CIO, IT Director, IT Manager, CFO, Controller, Finance Manager, Purchasing Manager, Person in Charge of their Software Project

THE CHALLENGE

The Client's core mission is to help companies implement and optimize Microsoft Dynamics AX and CRM applications. It sells its services primarily to large- and mid-sized businesses in verticals such as distribution, manufacturing, and professional services.

It recently refocused its marketing initiatives toward growing the customer base for its three industry-specific modules: industrial, professional services, and AX users. Part of the new customer acquisition strategy called for targeting prospects throughout the U.S via outbound channels.

However, being a small company whose in-house staff is best deployed following up qualified leads and nurturing opportunities instead of spending a great deal of their time prospecting, the Client opted to outsource.

HIGHLIGHTS

- Completed a 6-month US-wide appointment setting project for a leading enterprise cloud consulting firm.
- Generated high-value sales appointments for conversion within the next 12 months.
- Increased prospect quantity and quality by combining phone calls with emails and social media channels.

RESULTS WITHIN SIX MONTHS



63 Appointments
Set



57 Marketing-
Qualified Leads



585 Social Media
Connections

The Client chose Callbox at the suggestion of one of its partner IT companies. The Client pointed out that Callbox's marketing experience in the enterprise cloud space was a deciding factor.

Callbox designed an Account-based Marketing Lead Generation and Appointment Setting campaign which consisted of:

- Multi-Channel Lead Management which utilized Voice, Email, Chat, Web, and Social Media.
- Sales Enablement & Support which covered Team Training, Account Setup, and Back Office Sales Support.
- Tools & Subscriptions to the Callbox Pipeline and HubSpot CRM.
- Account Management with Strategy Building, Reporting, and Product Knowledge.

The Goals

- The Callbox team was to identify accounts that fit the target ideal customer profile for the Client's modules.
- Qualify contacts for each identified account by gauging purchase intent and solution fit.
- Collect additional prospect information to be used by its in-house reps in following up and nurturing potential leads.



Appointment Setting

1. Callbox compiled the list of target prospects from companies that meet the Client's requirements for industry, location, and annual sales.
2. Contacts whose organizations are currently evaluating their ERP or CRM software and are looking to acquire a new platform within the next 12 months are tagged as qualified prospects (qualified appointments or completed leads).
3. Probing questions for solution fit uncover information on software usage, business pain points, buyer role, etc.



Email Marketing

1. The Callbox team used emails for warming up/nurturing prospects and for distributing Client materials.
2. Callbox's SMART Calling technology prioritizes calls based on time and frequency of email opens, clicks, and replies.
3. Callbox also prepared and optimized all email marketing collaterals (templates, landing pages, etc.) used in the campaign.



Social Media

1. Callbox compiled the list of target prospects from companies that meet the Client's requirements for industry, location, and annual sales.
2. Contacts whose organizations are currently evaluating their ERP or CRM software and are looking to acquire a new platform within the next 12 months are tagged as qualified prospects (qualified appointments or completed leads).
3. Probing questions for solution fit uncover information on software usage, business pain points, buyer role, etc.

RESULTS

As per the Client, all 63 SQLs meet their sales criteria, so they expect to convert around 50% within the next 6 to 12 months.